

~~18-32-69~~

MEETING OF BOARD OF TRUSTEES - SEPT. 18, 1969

9 - Adjournment

FAMILY SERVICE BUREAU

Statement Month Ending August 31, 1969

	<u>CASH RECEIPTS</u>		<u>BUDGET</u>
	<u>AUGUST</u>	<u>8 Months</u>	<u>Year 1969</u>
Balance	\$ 0.00	\$(1,628.26)*	\$ 0.00
Welfare Federation	9,372.00	64,512.00	92,000.00
Turrell Fund	10,000.00	10,000.00	10,000.00
Victoria Foundation	0.00	11,500.00	11,500.00
Income from Investments	454.24	5,049.32	6,700.00
Christmas Fund	0.00	11,068.00	10,574.00
Fee Service	534.00	5,492.75	7,500.00
Project Enable	1,033.78	8,472.22	13,176.00
Project Seed	0.00	0.00	924.00
Project Team	(275.00)	4,400.00	8,400.00
Sale of Services	858.00	2,244.00	3,168.00
Miscellaneous Income	0.00	45.00	500.00
	<u>\$21,977.02</u>	<u>\$121,155.03</u>	<u>\$164,442.00</u>

* Excluding \$1,000 received for Christmas Fund 1969

Total Income for Eight Months \$121,155.03

Total Disbursements for Eight Months 129,768.02
Deficit \$ 8,612.99

Add: Annuity payments advanced in 1968
repaid by employees in 1969 450.48
N.J. Tax not yet forwarded 80.80
** Reduction in Loans Receivable (net) 279.80
Sale of \$10,000 U.S.A. Bills 9,873.00
Transferred from U.S. Savings Bank 500.00
Transferred from Howard Savings Inst. 1,871.84
Welfare deductions not yet forwarded 104.60

Less Deficit above

\$13,160.52
8,612.99
\$ 4,547.53

Less: Annuity payments advanced in 1969
not yet forwarded by employees \$24.12
Transferred to Investment a/c for
interest accrued on bonds purch. 72.56
Increase in Petty Cash 71.00 167.68

Balance on Hand - August 31, 1969

\$4,379.85

** \$266.30 of this due to reclassification
by the accountants.

DISBURSEMENTSBUDGET

	<u>AUGUST</u>	<u>8 MONTHS</u>	<u>YEAR 1969</u>
Salaries - Professional	\$ 9,171.71	\$72,512.28	\$116,340.00
Salaries - Clerical	2,756.33	22,266.54	27,000.00
Social Security	467.56	4,226.21	5,900.00
Annuity	(96.85)	1,511.63	(3,772.00)
Belleville - Retirement	69.20	549.30	(0.00)
Hospitalization	157.52	1,415.00	3,098.00
Bookkeeping	130.00	1,440.00	2,160.00
Audit	0.00	1,000.00	500.00
Kelly Services	0.00	0.00	0.00
Carfare	22.30	227.04	350.00
Telephone	506.92	3,230.15	4,500.00
Postage	13.04	256.08	600.00
Printing & Office Supplies	181.83	3,107.61	3,000.00
Literature	0.00	87.01	225.00
Light & Heat	94.02	726.98	1,500.00
Equip. Repairs & Rentals	7.00	345.48	(4,100.00)
Bldg. Repairs	0.00	147.02	(4,000.00)
New Equipment	0.00	1,342.75	(0.00)
Cleaning Service	308.50	2,123.00	3,400.00
Janitor's Supplies	0.00	127.99	350.00
Insurance	745.00	1,630.00	1,150.00
Dues & Contributions	0.00	3,471.25	4,007.00
Conferences	19.80	832.90	2,400.00
Annual & Board Meetings	0.00	903.22	600.00
Adv. Pub & P/R	105.55	679.47	1,093.00
Auto Expense	123.95	1,028.35	2,600.00
Rent - Belleville & Kearny	278.00	1,324.00	1,536.00
Ancillary Personnel	0.00	0.00	0.00
Psychiatric Consultations	0.00	1,800.00	3,075.00
Cash Relief	195.60	971.01	1,200.00
Miscellaneous	1.29	395.75	850.00
	<u>\$15,405.16</u>	<u>\$124,768.02</u>	<u>\$199,308.00</u>

PROJECT TEAM #2

Statement for Period Ending August 31, 1969

Cash received from 9-15-68 to 8-31-69	\$68,254.00
Less: Cash disbursed from 9-15-68 to 8-31-69	<u>67,771.50</u>
Balance on Hand - August 31, 1969	\$ <u>482.50</u>

<u>BREAKDOWN OF EXPENSES</u>	<u>AUGUST</u>	<u>CUMULATIVE</u>
Salaries - Professional	\$4,686.58	\$53,620.77
Salaries - Clerical	201.25	2,248.00
Employee Benefits	330.48	6,168.91
Administration & Supervision	450.00	5,175.00
Travel Expenses	31.30	599.90
Stationery	0.00	0.00
Bookkeeping	53.00	575.00
Printing & Office Supplies	0.00	29.89
Insurance	0.00	212.50
Transferred to Petty Cash	0.00	55.00
	<u>\$5,749.57</u>	<u>\$68,679.57</u>

Less: Amount returned by		
Family Service Bureau		
Re: Workman's Compensation	750.00	<u>750.00</u>
	\$4,999.67	\$67,929.97

Less: Welfare deduction not		
yet forwarded	29.10	29.10
	<u>\$4,970.57</u>	<u>\$67,900.87</u>
Less: SS & W.T. not forwarded	129.37	129.37
	<u>\$7,841.20</u>	<u>\$67,771.50</u>

COMMITTEE MEETING DATES BY MONTHS

SEPTEMBER 1969

Public Relations	9-24
Bldg. & Operations	9-29

MARCH 1970

Bldg. & Operations	3-2
Public Relations	3-18
Const. & By-Laws	3-20
Nominating	3-24
Finance	3-25

OCTOBER 1969

Personnel	10-10
✓ Case	10-14
Social Issues	10-17
Finance	10-22

APRIL 1970

✓ Personnel	4-10
Case	4-14
Social Issues	4-17
Finance	4-22

NOVEMBER 1969

Nominating	11-24
Long Range Planning	11-25
Finance	11-26

MAY 1970

Long Range Planning	5-26
Finance	5-27

DECEMBER 1969

Bldg. & Operations	12-1
✓ Case	12-9
Public Relations	12-17
Const. & By-Laws	12-19
Finance	12-24

JUNE 1970

✓ Bldg. & Operations	6-1
Case	6-9
Personnel	6-12
Public Relations	6-17
Social Issues	6-19
Finance	6-24

JANUARY 1970

Personnel	1-9
Social Issues	1-16
Finance	1-28

AUGUST 1970

Long Range Planning	8-25
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FEBRUARY 1970

✓ Case	2-10
Long Range Planning	2-24
Finance	2-25

COMMITTEE ASSIGNMENTS - 9-1-69 THRU 6-30-70

All meetings for all committees, unless otherwise designated, are at 11 a.m. at F.S.B. offices. The Finance Committee meets at 12 noon at F.S.B. offices - lunch. Below, dates of meetings are listed beside respective committees.

The committees meet as follows:

Executive - on call of the President	- Dr. Wood, Chairman	Social Issues	- quarterly - Mr. Leece, Chairman
Case - every other month	- Mr. Schein "	Building & Operations	- quarterly - Mr. Wilson "
Personnel - quarterly	- Mr. Mordinger "	Long Range Planning	- quarterly - Mr. Hardin "
Finance - monthly	- Mr. Williams "	Nominating	- semi-annually - Mr. Barlow "
Public Relations - quarterly	- Mr. Connolly "	Const. & By-Laws	- semi-annually - Mr. Osborne "

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MR. ARMENTZ	- FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24)	MR. CONNOLLY	- EXECUTIVE (on call) PERSONNEL (10-10 1-9 4-10 6-12) PUBLIC RELATIONS (9-24 12-17 3-18 6-17) LONG RANGE (11-25 2-24 5-26 8-25)
MR. BALDWIN	- NOMINATING (11-24 3-24) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE PLANNING (11-25 2-24 5-26 8-25)	REV. DRAESSEL	- SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9) CONSTITUTION & BY-LAWS (12-19 3-20)
MR. BANKS	- PUBLIC RELATIONS (9-24 12-17 3-18 6-17) SOCIAL ISSUES (10-17 1-16 4-17 6-19) NOMINATING (11-24 3-24)	MISS DUFFY	- PERSONNEL (10-10 1-9 4-10 6-12) BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) CASE (10-14 12-9 2-10 4-14 6-9)
MR. BARLOW	- BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) NOMINATING (11-24 3-24) CASE (10-14 12-9 2-10 4-14 6-9)	MR. DUNKER	- FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9)
MR. BENELL	- FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE PLANNING (11-25 2-24 5-26 8-25)	MR. HARDIN	- EXECUTIVE (on call) PERSONNEL (10-10 1-9 4-10 6-12) BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) LONG RANGE (11-25 2-24 5-26 8-25)
MR. BERESFORD	- BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) PERSONNEL (10-10 1-9 4-10 6-12) CONSTITUTION & BY-LAWS (12-19 3-20)	MR. HOGAN	- SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE (12-25 2-24 5-26 8-25)
CANON BERRY	- PERSONNEL (10-10 1-9 4-10 6-12) SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9)		

COMMITTEE ASSIGNMENTS - 9-1 THRU 6-30-70

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MR. JAMISON	- PERSONNEL (10-10 1-9 4-10 6-12) FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) LONG RANGE (11-25 2-24 5-26 8-25)	MR. SCHEIN	- PUBLIC RELATIONS (9-24 12-17 3-18 6-17) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE (11-25 2-24 5-26 8-25) NOMINATING (11-24 3-24)
MRS. KEENEY	- BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) CASE (10-14 12-9 2-10 4-14 6-9) NOMINATING (11-24 3-24)	MR. STERLING	- PUBLIC RELATIONS (9-24 12-17 3-18 6-17) BUILDING & OPERATIONS (9-29 12-1 3-2 6-1) CONSTITUTION & BY-LAWS (12-19 3-20)
MR. LEECE	- EXECUTIVE (on call) PERSONNEL (10-10 1-9 4-10 6-12) SOCIAL ISSUES (10-17 1-16 4-17 6-19) LONG RANGE (11-25 2-24 5-26 8-25)	MISS VOIGT	- EXECUTIVE (on call) SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE (11-25 2-24 5-26 8-25)
MR. MERDINGER	- EXECUTIVE (on call) PERSONNEL (10-10 1-9 4-10 6-12) FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) BUILDING & OPERATIONS (9-29 12-1 3-2 6-1)	MRS. WARREN	- SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9) LONG RANGE (11-25 2-24 5-26 8-25)
MR. OSBORNE	- EXECUTIVE (on call) PUBLIC RELATIONS (9-24 12-17 3-18 6-17) LONG RANGE (11-25 2-24 5-26 8-25) CONSTITUTION & BY-LAWS (12-19 3-20) PROJECT ENABLE	MR. WILLIAMS	- FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) CONSTITUTION & BY-LAWS (12-19 3-20)
MRS. ROSENBERG	- SOCIAL ISSUES (10-17 1-16 4-17 6-19) CASE (10-14 12-9 2-10 4-14 6-9) NOMINATING (11-24 3-24)	MR. WILSON	- EXECUTIVE (on call) PERSONNEL (10-10 1-9 4-10 6-12) FINANCE (10-22 11-26 12-24 1-28 2-25 3-25 4-22 5-27 6-24) BUILDING & OPERATIONS (9-29 12-1 3-2 6-1)
DR. SILVERMAN	- PERSONNEL (10-10 1-9 4-10 6-12) CASE (10-14 12-9 2-10 4-14 6-9) NOMINATING (11-24 3-24)	DR. WOOD	- EX OFFICIO ALL COMMITTEES
		MR. KILDUFF	- EX OFFICIO ALL COMMITTEES

FAMILY SERVICE ASSOCIATION OF AMERICA
REPORT OF
REACCREDITATION STUDY

FAMILY SERVICE BUREAU
NEWARK, NEW JERSEY

April 21 thru April 24, 1969

INTRODUCTION

Membership in Family Service Association of America requires that Member Agencies be evaluated regarding their ability to meet Membership standards every six years. This review of aspects of agency development is the responsibility of the Division of Regional Services of FSAA. Besides considering Membership standards, a review of this sort can provide a benchmark in the agency's development, at which time the current state of the agency and its future can be thoroughly considered. While responsibility for maintenance of the agency remains primarily in the hands of the agency's own board and staff, an evaluation by an outside resource can be a useful tool in carrying out that responsibility.

Prior to the field visit, the agency completed and submitted a self-study. This was a well organized document which gave a comprehensive picture of administration and program. This was followed by a four day visit to the agency by the Regional Representative who used the self-study material as a guide during the process. Conferences were held with the Executive Secretary the Director of Casework, the President, several individual staff members, and the Executive Director of the Council of Social Agencies. Meetings were held with the entire agency staff, the Nominating Committee; and UCF staff. Visits were made to some of the agency's outreach programs. Board minutes through the past year, and representative case and group records were examined. Finally, the results of the study were reported at a board meeting.

REACCREDITATION STATUS

The Family Service Bureau meets Membership Requirements of Family Service Association of America, and it is reaccredited for continuing Membership. It was clear throughout the study that the agency is a leader in finding new ways of meeting human needs and in relating agency services to the specific community which it serves.

AGENCY AND COMMUNITY

Although Family Service Bureau serves some areas with suburban characteristics, the agency is primarily concerned with the center city of Newark. The city has, like many northern urban areas, seen a recent influx of large numbers of Brown and Black population, coming from the southern United States and New York City. These populations are often displaced in an urban, technological society, undertrained for employment, poorly educated and economically deprived. As a result, considerable cultural conflict develops, and disruption of family experience can ensue.

While Newark has seen considerable civic disruption and political conflict as a result of these factors, it has also made increasing efforts to provide a stronger network of services for these populations.

Throughout this same period, Family Service Bureau has utilized new financing procedures and new methods for delivery of service so that a large part of its program is no longer a conventional casework service but rather a series of services tailored to meet the specific human needs seen in the area. However, it has retained a sound counseling program, with good coordination with the newer services.

This evolution of the agency is entirely compatible with the ideology of FSAA, which is interested in innovative programming for family agencies to meet previously unseen needs. The family service field is in transition therefore, moving to broaden its service content to meet the needs of special populations.

As a result, the major finding of the reaccreditation process is that Family Service Bureau should be highly commended for its understanding of social need in its service area and its response to that need.

The agency is particularly characterized by its broadening of the concepts used in the local and national ENABLE program. The basic methodology of Project ENABLE is to combine elements of family life education and neighborhood social action through a combination of professional service and engaging indigenous neighborhood leadership to provide recruitment and casework services. While Project ENABLE was designed to provide services to deprived neighborhoods, Family Service Bureau has pioneered in demonstrating that the ENABLE model may be used in relation to other goals, such as underemployment, skill training, and adjustments to public education.

In conjunction with these expansions of program areas, skill has been demonstrated in broadening the financial base of the agency through a variety of contracts. Agency administration has shown commendable interest in the various trends in programming in the area, and ability to connect with financial resources which have enabled the agency to expand to meet new needs.

Board structure and content indicates that there is appropriate attention given to developments in the agency, and proper accountability and direction maintained by a representative group of laymen, thus ensuring community control of the agency and providing deepening and enrichment of program

concepts.

Within the agency's counseling program, there is evidence of use of all modern treatment modalities, and continuing effort to add knowledge covering the newer treatment modalities which are developing in the field.

Generally, the agency's policies are appropriate to its program. There is evidence again of appropriate board control in dealing with the variety and complexity now characterizing the agency's program.

The agency shows high standards of productivity on the part of its staff. Both the quality and the quantity of service content, as demonstrated in statistics and records, shows knowledge and dedication by the staff, and continuing proper accountability to administration.

The agency has well defined procedures for using differentially trained staff, and conserves professional time through the use of such paraprofessionals as social work aides and assistants. This development, recent in the family service field, is of continuing interest to FSAA. The field is now moving toward some use of differentially trained staff from other disciplines, and it would appear that Family Service Bureau, through its experience with its existing varieties of staff, may be able to move toward interdisciplinary staff as well.

At the time of the study, the agency's salary guides were in line with FSAA recommendations. The experience level of the existing staff is quite high, and in view of the above comments regarding production, there is every indication that this attention to staff salaries has a direct effect upon the agency's production.

At the same time, the agency recognizes the need for continuing professional ^{training} stimulation, and has appropriate in-service/devices. Similarly, there are appropriate channels for enriching the total practice of the agency through the variety of programs by means of sound interstaff communication devices.

Thus the reaccreditation study demonstrates that Family Service Bureau is an alert, modern, leadership agency. The following discussion is directed to agency administration in order to provide tools for further development. These comments are geared to current issues which the agency will be facing which will require further resolution.

BOARD AND COMMITTEES

The agency has a sound committee structure which provides operable channels to explore detail for the entire board. However, some changes might make this structure more useful.

The most common approach to the more detailed work of the board in a family agency is to establish a group of standing committees which maintain continuing concern in relation to areas requiring regular attention. In contrast, when agencies require attention to a certain matter over a short period of time, and can conceive that a committee can produce concrete results, the charge to the committee thus being limited, a special or "ad hoc" committee is designated. In recent years, some agencies have experimented with an extension of the special committee approach, utilizing "task forces" to work with certain aspects of materials which had been the concern of standing committees. Although experience is limited, this latter method would seem to have certain advantages, in that in order to charge a task force, an agency board is required to determine tasks in a very definite way, and thus is

forced constantly to analyze what is needed from its committee. Committee members therefore are apt to become more fully instructed as to their duties, which are time limited, thus conserving volunteer time.

Family Service Bureau is currently using the former, and older approach, combining standing and ad hoc committee structures. In view of this it becomes important to conceptualize which functions are considered to be permanent (standing committees) and what are short term (ad hoc committees). It is recommended that certain changes be made in the designation of certain committees.

The By-Laws Committee is established as a standing committee. It is questionable that by-laws changes require regular and constant attention, so that such a standing committee is likely to remain inactive for long periods of time. An economy of committee assignments would be effected if committee structure to inspect by-laws was developed only at those times when the board was desirous of such change.

On the other hand, the Building and Operations Committee and the Long-Range Planning Committee are functioning on an ad hoc basis. Since such committees are charged with continuing operational issues, and in this sense cannot "complete" their charges, they should be operated on a standing committee basis. Therefore, these committees should be mentioned in the agency by-laws.

The agency minutes suggest there is some confusion in the use of the Long-Range Planning Committee and the Case Policy Committee. In view of the fact that both these committees are concerned with program, they are charged

with separate parts of the job of program development, this separation based on a concept of time. A long-range planning committee is less concerned with the implementation of program, and instead needs to concern itself primarily with that which may be predicted about future agency program and community need. Ideally, ideas should develop in a long range planning committee which should then be processed through a casework policy committee for implementation. These concepts should be used as guidelines in developing agendas for these two committees. At present, it would appear that the work of the two committees is sometimes indistinguishable.

In view of the complex nature of both the community and the agency services, committee work of the agency can itself become quite complex. The membership of the board may not always provide personnel necessary to do all committee work. At times, additional skills and/or experience may be required. In order to expand the ability of committees to encompass their work, the agency should consider the provision of allowing non-board members to serve, perhaps temporarily, as members and/or consultants to committees. Thus the agency can tap a larger cross section of the community, while at the same time might gain experience with valuable future board members.

For similar reasons a more intensive nominating process should be considered by the board. The nominating committee should function on a year-round basis, first appraising the current membership of the board to determine what additional backgrounds are needed by the board to be fully representative of the community, and also to receive appropriate technical help in certain areas. In most cases, the kind of person who is wanted for the board should be determined before approaching the issue of individual persons.

Since the agency's clientele includes large numbers of deprived minorities, the agency should include representation of these client groups within its board. In some of the agency projects, it has been demonstrated that it may be fruitful to involve clientele in some aspects of policymaking. Such considerations as subsidization, problems of relating to a more affluent group, and the need to bring more than one such representative on the board at the same time, may require special attention if the agency chooses to enrich its board membership in this way.

Although there is every evidence of the dedication of board members, and their involvement with the agency in both committees and a variety of informal ways, the agency's actual board attendance is below par for a family service agency. Self-study materials indicate an approximate 50% attendance rate. This should be increased.

POLICIES

Family Service Bureau is unusual for its size in utilizing internal policy documents which tend to be loosely drawn. There are certain advantages to this in the flexibility which may be possible. At the time of the study, considerable attention was given to a variety of policy matters, and it appeared that appropriate areas were covered by agency policies, and that the somewhat inexact, loosely gauged statements had been adequate enough. However, as the agency continues to grow, it may be necessary to provide statements which cover a larger number of eventualities. FSAA documents and statements from other agencies as contained in the FSAA library can be extremely helpful if the agency chooses to move in this direction.

Certain additions are now necessary within the personnel policies.

Section III, Separations needs further attention. The current policy requires that the agency provide a one month notice in the event that a professional staff member is separated from the staff as long as that staff member has been at the agency for at least a year, and two weeks when tenure is six months or less. In this case the agency would be unable to remove a staff member immediately in a case where this might be in the best interest of the agency. In order to protect the employee from a sudden termination, however, agencies generally allow that the employee may be paid off for notice time when it is deemed advisable that termination is immediate. Such an option should be written into this section.

In view of the fact that many agency staff members are supported by project funds of uncertain duration, it is extremely important that the personnel policies include a retrenchment policy. The current statement on separations pertains only to terminations due to unsatisfactory performance. The writing of such a policy should include consideration of differences between permanent and temporary positions, and what employees are most vulnerable when staff is reduced. Most agency personnel policies provide certain seniority advantages. Commonly, the most senior employee in a given job whose performance is considered satisfactory is least liable to retrenchment in that position. Similarly, many agencies provide for awarding tenure following the first six months or year of employment. Prior to granting tenure, the agency may terminate with the employee without specific cause and without the employee being permitted to utilize agency grievance machinery.

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Such a procedure provides for some flexibility for management when it becomes easily apparent that a new employee is unadaptable. At the same time, it rewards satisfactory performance.

At the time of the visit, the agency had commendable plans to decorate and expand the much used conference room and library of the agency. Further consideration should be given to a common room for the agency's active in-service training program. An important new method in this area has been demonstrated in many agencies. With the development of new equipment, it has become possible to observe interviews for purposes of in-service education in unobtrusive ways when the client's permission is given. Many agencies are using mirror-screens combined with sound equipment so that caseworkers can observe each other's performance and have the opportunity to comment on interviewing approaches while the interview is in progress. In addition, costs for TV taping equipment have diminished so that some agencies have been able to visually record interviews to be played back at times when this proves convenient, and to repeat such showings. The general level of sophistication of the staff in Newark would suggest a readiness for such techniques to be used. Since such equipment is a one-time expenditure, agencies have often been successful in approaching foundations for these costs. The resultant enrichment of in-service educational opportunities and the transferability of expertise suggests that effort expended in this direction is very productive.

The agency's approach to fees has been cognizant of the use of fees in aiding the casework process, but has not yet included the philosophy that fees are an important income item. It would appear that there is a

reflection of this in the agency's low production of fee income under a fairly 'loose' fee policy. Many family agencies have come to consider fee income as an important source of revenue. It appears possible in most communities to regain approximately 10% of a counseling budget within the orientation of a fairly scaled fee charge. However, agencies have had to produce fairly complex fee statements, and often have had to gain experience over a period of years to build to this level of return. Clear accountability of the caseworker for appropriate fee income from his cases is required. More complete examination of this area could be expected to increase yield gradually.

STAFF

As noted above, the agency has a highly qualified staff, reasonably compensated. It has not yet produced as finely gauged a description of professional positions as described in FSAA personnel documents. Although this is working satisfactorily, some thought should now be given to some aspects of the higher professional positions in the agency.

The Executive Secretary acts as secretary of the board. Although this practice was in common use historically, it has been largely abandoned in recent times. First, this practice necessitates that the executive be somewhat absorbed in the process of minute taking when he should be free to act as the major staff advisor to the board. Secondly, a question of "slanting" the minutes, if it should arise, could place the executive in a difficult position with some of his board members who are also his employers.

Further questions should be raised about the current position, Director of

Casework Services. This title, commonly in use in the past, has been undergoing change within the field. The reasons are apparent within the program of the Family Service Bureau, which is expanded beyond "casework services". Therefore, the person carrying major program responsibilities is now usually designated "Director of Professional Services" or "Assistant Executive Director".

The organization chart, revised June 1967, submitted in the agency self-study, indicates that the Director of Casework Service, the Office Manager and the Project Coordinator have equivalent responsibilities on the staff. However, in examining the functioning of the agency, it becomes clear that the Director of Casework Service carries responsibilities far more advanced than the other two positions. Therefore, it is recommended that the Director of Casework Service position be upgraded in order to reflect actual job expectations.

PROGRAM

As noted above, the agency has made an outstanding contribution to the field in extending the model of the ENABLE program for use with specialized social problems. The various reachout services of the agency tend to be designed along lines borrowing upon this model. Now it may be possible for the agency to utilize other program models as a means of further extending its reaching out to special populations. Family service literature contains many examples of these diverse methodologies, as for example neighborhood-based crisis intervention centers, credit counseling programs, on-the-job industrial consultation, and programs utilizing small group theory designed to effect family system change.

In studying agency program, examination was made of program statistics. In the process, some discrepancies were found, leaving some question about the complete accuracy of these figures. A need for further attention to this method of accountability seems indicated. The agency is not yet using the most recent FSAA recommendations as contained in the FSAA document. Daily Contact Reporting: A Way to Modify Recommended Statistical Systems to Provide Better Information. This method should have particular applicability to Family Service Bureau, in view of the variations in delivery of service which require widely varying amounts of staff time. Daily contact reporting provides a means of adding a time component to ~~here~~ statistical figures. It also reinforces the process of collecting statistical data by more frequent collection.

At the time of the visit, considerable attention was being given to recording practices within the agency. While this attention is appropriate, it should be noted that recording practices indicated a high degree of mastery of modern recording methods, and indicated efficiency within this activity.

The agency is alert to increasing needs to gain information about its own program. Current statistical methods, as designed by FSAA, are not able to meet all the information needs which unique and complex agency programs require. For this reason, FSAA is attempting to initiate a new project "Information Management, Processing, Analysis, and Communication" (IMPAC). The agency may wish to be in touch with the Department of Systems and Statistics on this subject.

The agency is also aware of the important implications of the use of Planned Short-Term Treatment as an important new development in the family service

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field. This method has improved treatment results for some client families while at the same time decreasing required professional service hours in treatment. Some staff members show considerable ability in the use of such treatment. In view of successful experience with this method, expansion of its use is currently being considered. One aspect of such expansion may necessarily include revision of the agency's intake system to more clearly screen clientele who may profitably use planned short term treatment methods. More professional hours may be necessary in a central intake procedure to carry out planned short term treatment within an intake unit. Thus more specialized caseload assignments may also be required. Such developments would require a close working relationship between board and staff, since elements of professional treatment capability and case administration need to be combined to expand successfully in this area of treatment

SUMMARY

Family Service Bureau is a highly innovative, dynamic organization which has had many successes in responding to the complex needs of a highly urban area through diverse approaches to delivery of services. The agency is re-accredited in its Membership in FSAA with high commendation for its demonstration of excellent professional competence, program pioneering, and growth. The agency's Membership in FSAA is mutually beneficial, providing development and enrichment for both organizations.

The major recommendations for the agency's future development are as follows:

1. Review standing and special committee status.
2. Increase representation on committees and board.
3. Increase board attendance.
4. Further define agency policies.
5. Review personnel policies regarding new hires and terminations.
6. Explore provision of interview observation equipment.
7. Consider fee policies in relation to income possibilities.
8. Redefine positions of Executive/Secretary and Director of Casework Services.
9. Consider additional models for outreach programming.
10. Tighten statistical procedures.
11. Consider IMFAC as a possible agency resource.
12. Expand structure for planned short-term treatment.